Division of Technology Services
DEVELOPMENT AND APPLICATION SUPPORT

DART IR for Read-Only Users
Job Aid

Job Aid Purpose:	To provide procedures and guidelines for DART Incident Reporting tool users assigned to the Read-Only role.
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1. OVERVIEW

When you log in to the DART IR tool as a Read-Only user, the system limits your capabilities to navigating the system and selecting the Incident report (IR) to view. For example, you can use the **Incident Search** window to locate and display an IR, and then review the information in one or more incident reporting tabs. The Consumer History tab is especially useful for reviewing IR information.

2. PROCESS DESCRIPTION

The process of using the DART Incident Reporting tool as a Read-Only user requires that you perform the following procedures:

- Access the IR tool and locate an Incident report
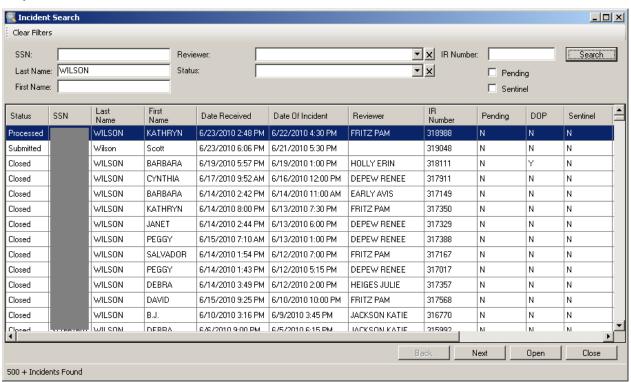- Review the Incident report data

2.1 Accessing the IR Tool and Locating an Incident Report

Use the following procedure to access the DART Incident Reporting tool and locate the desired IR:

1. Log in to the DART product as either a DA Read-Only user or DDRS Read-Only user.

2. On the main screen, select the **INcident** button. The system displays a blank **Incident Reporting** window.

3. Select **Search > Incident Reports** from the Menu bar. The system displays a blank **Incident Search** window.

4. Enter information into one or more of the search parameter fields at the top of the **Incident Search** window and then select **Search**. The following illustration shows the search parameter fields:
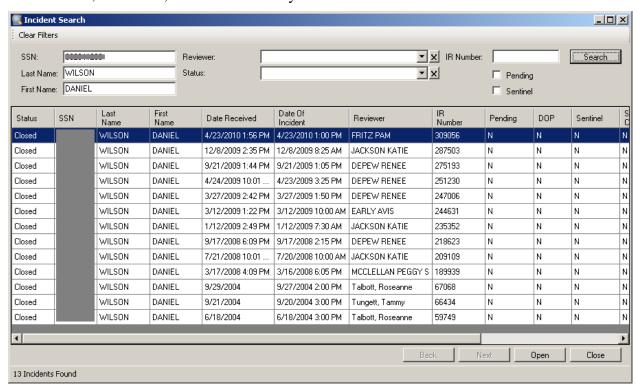

The more information you enter into the search parameter fields, the more accurately the system can perform the search. For example, the following illustration shows the results of searching only on the last name **WILSON**:

As shown in the lower left corner of the **Incident Search** window, this search returned more than 500 IRs. While you *could* use the **Next** button to move to subsequent pages of 500 results each, this method is challenging and unnecessary if you possess more information about the consumer or the IR.

By contrast, the following illustration shows the results of searching for Daniel Wilson by using his last name, first name, and Social Security number:

Notice that this search narrows the search results to 13 IRs, making it significantly easier to locate the IR to display.

You can also use the following other parameters in the **Incident Search** window to search for an IR:

- The IR Status
- The IR Number
- IRs marked as Pending
- IRs marked as Sentinel

Tip

At this time, you cannot use the Reviewer name as a search parameter.

Clicking a column header sorts the information by that column, which can also make it easier to locate the desired IR. For example, clicking the **IR Number** column header arranges the list by IR number in ascending order. Clicking **IR Number** again sorts the list by IR number in descending order.
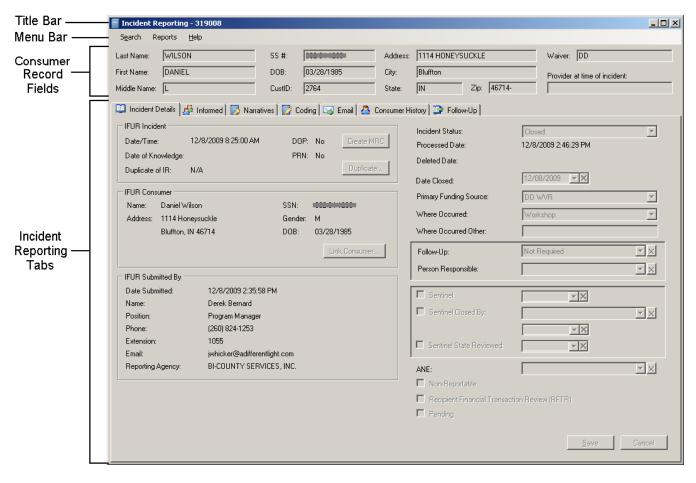
5. After you locate the desired IR, double-click on the row that contains it. The appropriate **Incident Reporting** window appears and displays the selected IR so that you can review it.

2.2 Reviewing Incident Report Data

The **Incident Reporting** window displays the contents of a selected IR, and contains the following main elements:

- Title bar
- Menu bar
- Consumer record fields
- Incident reporting tabs

The following illustration shows an example of the **Incident Reporting** window and calls out the major window elements:

2.2.1 Title Bar

The Title bar contains the **Incident Reporting** window name and displays the number for the selected IR. The right side of the Title bar also displays standard MS Office window controls that you can use to minimize, maximize, and close the window.

2.2.2 Menu Bar

The Menu bar contains menus that you can use to manage IRs in the **Incident Reporting** window. When you select a menu from the Menu bar, a list appears that contains the menu items that you can select.

The Menu bar provides the following menus:

Search
The following item on the **Search** menu is available to Read-Only users:

- **Incident Reports**   Select this menu item to display the **Incident Search** window, which you can use to locate an IR by using one or more search parameters.

Reports
The **Reports** menu provides the following item:

- **Incident Print**   Select this menu item to display the **Incident Print** window, which contains a copy of the preview IR that appeared in the IFUR tool when the reporter submitted the IR. The toolbar in the **Incident Print** window includes tools that you can use to navigate to a different page, print, and export the preview IR.

Help
The **Help** menu provides the following items:

- **User Guide**   Select this menu item to display the **Incident Reporting** document library, which contains DA and DDRS versions of the *DART Incident Reporting User Guide* PDF files.

- **About**   Select this menu item to display the **About IR** window, which provides version and copyright information about the DART Incident Reporting tool.

2.2.3   Consumer Record Fields

The consumer record fields display the consumer's DART or INsite account information for the linked IR.

2.2.4   Incident Reporting Tabs

The incident reporting tabs display the information used to process the currently selected IR. The **Incident Reporting** window contains the following incident reporting tabs:

- Incident Details
- Informed
- Narratives
- Coding
- Email
- Consumer History
- Follow-Up

2.2.4.1 Incident Details Tab

When you select an IR from the **Incident Search** window, the system displays the **Incident Details** tab by default. The left side of the **Incident Details** tab contains fields that provide background information about the IR. The right side of the **Incident Details** tab displays the fields that the Reviewer used to process the IR.

2.2.4.2 Informed Tab

The **Informed** tab contains fields that correspond to the fields in the **Informed** section of the IFUR tool. The fields on the **Informed** tab display the values that the reporter originally entered on the IR in the IFUR tool.

2.2.4.3 Narratives Tab

The **Narratives** tab contains multiple sub tabs that display the original incident description and plan to resolve, as well as any notes added by the Reviewer or other users. The following sub tabs can appear in the **Narratives** tab:

- General
- PRN
- Death
- Sentinel
- Reviewer Notes
- Follow-Up Questions

The **PRN** and **Death** sub tabs only appear if the corresponding **PRN** and **DOP** fields were completed for the IR in the IFUR tool. The remaining sub tabs always appear, regardless of whether the sub tabs contain information.

2.2.4.4 Coding Tab

The **Coding** tab contains a directory structure of coding categories that the Reviewer used to code the IR, along with the **Describe the Incident** and **Plan to Resolve** field notes copied from the **Narratives** tab. If the IR is an original record that was submitted to the current DART IR product, you can expand the categories to review which codes were applied.
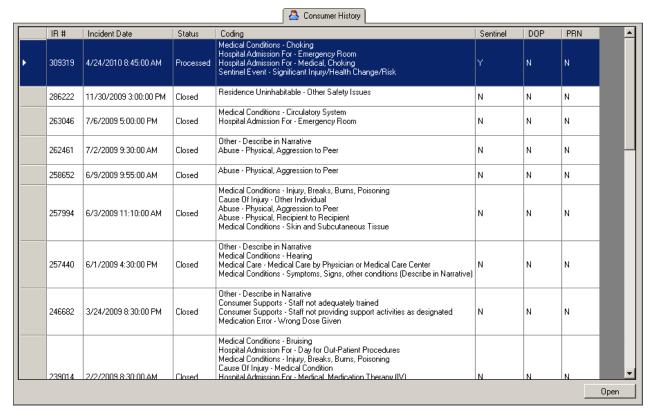
If you are viewing an IR that was migrated from a previous incident reporting system, a **Display Migrated Coding** check box appears in the lower left corner of the **Coding** tab. You can click this check box to display the coding values that were applied to the IR in the previous incident reporting system.

2.2.4.5 Email Tab

The **Email** tab displays an email queue that contains records of the emails that were sent for the IR from the DART IR system.

2.2.4.6 Consumer History Tab

The **Consumer History** tab displays a table of all of the IRs submitted for the consumer. The following illustration shows an example of the **Consumer History** tab:

You can open an IR on the table by double-clicking on the IR record or by selecting the record and then clicking the **Open** button in the lower right corner. The **Incident Reporting** window displays the opened IR, and each of the incident reporting tabs reflects the corresponding information that was used to process the IR.

You can sort the information in the table to aid in locating a desired IR to view. By default, the system sorts the table by the **Incident Date** column in descending order. To change the sort order, click on a different column heading. The system applies an arrow icon to the column heading to indicate the direction of the sort. An up arrow indicates an ascending sort, while a down arrow indicates a descending sort.

2.2.4.7 Follow-Up Tab

The **Follow-Up** tab displays the information that Reviewers used to process a Follow-Up report (FUR) that was associated with and ultimately linked to the selected IR.

When you have finished reviewing IRs in the **Incident Reporting** window, select the **Close** window control in the upper right corner to close the window.